

Status Report on the Implementation
of RTAP Road Transport Actions
In the MEDA Maghreb Countries



Road Study

January 2010



This project is funded by the European Union

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Towards an Integrated Euro-Mediterranean Transport System

EuroMed Transport Study Road Transport In Maghreb Countries

Algeria – Morocco – Tunisia

Status Report on the Implementation of the Actions of the
Regional Transport Action Plan (RTAP) for the Mediterranean
2007-2013 & Recommendations for further Implementation



This project is financed by the European Union

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Abbreviations & Definitions

ADR	UNECE agreement regulating international carriage of dangerous goods by road
AETR	UNECE agreement regulating working and rest periods of professional drivers
AGA	Algérienne de Gestion des Autoroutes - Algerian Highways Agency
AGR	UNECE agreement on Road Network
AGTC	UNECE agreement on combined transport network
ANA	Agence Nationale des Autoroutes-National Highways Agency
ATP	European Agreement on the International Carriage of Perishable Foodstuffs
CMR	UNECE agreement standardising goods transportation contracts
CTI	Comité des Transports Intérieurs - Internal Transport Committee
DEPC	Direction des Etudes, de la Planification et de la Coordination - Department of Studies, Planning and Coordination
DRCR	Direction des Routes et de la Circulation Routière - Roads and Road Traffic Department
DSRT	Department of the Road Transportation Safety
DTP	Directions des Travaux Publics - Public Works Directorate
DTR	Directions des Transports Routiers - Road Transport Department
FNTR	Fédération Nationale des Transports Routiers - National Federation of Road Transport
GDP	Gross Domestic Product
MDCI	Ministère du Développement Economique et de la Coopération Internationale - Ministry of Economic Development and International Cooperation
MEHAT	Ministère de l'Équipement, de l'Habitat et de l'Aménagement du Territoire - Ministry of Equipment, Housing and Territory Planning
MET	Ministry of Equipment and Transport
MF	Ministry of Finance
MIDL	Ministère de l'Interieur et du Developpement Local - Ministry of Interior and Local Development
ONT	Office National du Transport - National Transport Office
RTAP	Regional Transport Action Plan
PTAC	Total Permissible Weight in Charge
PTC	Real Total Weight in Charge



RATC	Régies Autonomes de Transport en Commun - autonomous public transportation companies
SA	Société Anonyme - Public Liability companies
SARL	Société A Responsabilité Limitée - limited liabilities
SNC	Société en Nom Collectif – Partnership Companies
SNTL	Société Nationale des Transports et de la Logistique - National Transports and Logistics Company
SNTRI	Société Nationale du Transport Interurbain - National Intercity Transport Company
STT	Société de Transport de Tunis - Tunis Transport Company
TIR	UNECE agreement, regulating international customs transit
UNECE	United Nations Economic Commission for Europe
VAT	Value Added Tax



INTRODUCTION



1 Introduction

The first Euro-Mediterranean Transport Ministerial Conference took place in Marrakech in December 2005. During this conference the EuroMed Transport Forum was asked to elaborate a Regional Transport Action Plan (RTAP) specifying the short- and medium term priorities for advancing the recommendations of the so-called 2005 "Blue Paper Towards an Integrated Euro-Mediterranean Transport System" and the 2005 report of the High Level Group on the "Extension of the Major Trans-European Transport Axes to the neighbouring countries and the regions". This extension is currently being further developed as the so-called Trans-Mediterranean Transport (TMT) Network.

The "RTAP 2007-2013" was approved and adopted during a High Level Conference on the "Extension of the Major Trans-Europeans Transport Axes of the Mediterranean Region", held in Lisbon, on 3rd December 2007. It is an attempt to intensify cooperation between the countries of the European Union and the Mediterranean partner countries and within the Mediterranean partner countries in the field of transport which in its turn aims to accelerate economic integration and policy towards greater stability and prosperity in the Mediterranean Region. The plan covers a six year period from 2007-2013 and comprises a set of actions in different transport sectors (maritime, road, railways and civil aviation) and targets mainly regulatory (institutional) reform and infrastructure network planning and implementation.

The RTAP includes the two following actions for Road Transport

Action 10 foresees the set-up of a Mediterranean Task Force to assess adherence to United Nations Economic Commission for Europe (UNECE) agreements and identifies measures for implementing these (Action 10A). Furthermore, the Task Force is expected to come up with recommendations for the gradual liberalisation and harmonisation of international road haulage (Action 10B).

Action 11 is concerned with regulatory reforms in the road transport industry and in particular the improvement of legislation in the areas of driving license and driver tests, operation license systems, and road worthiness tests.

Both actions 10 and 11 are expected to be implemented in the short-term, i.e. by the end of the year 2009.

Therefore, a Sub-Group on Road and Rail Regulatory Issues was set up under the Working Group (WG) on "Infrastructure and Regulatory Issues".

The following chart outlines the institutional setup of the EuroMed Transport Project Forum and its Working Groups.



Under the Auspices of the Co-presidency of the Union for the Mediterranean

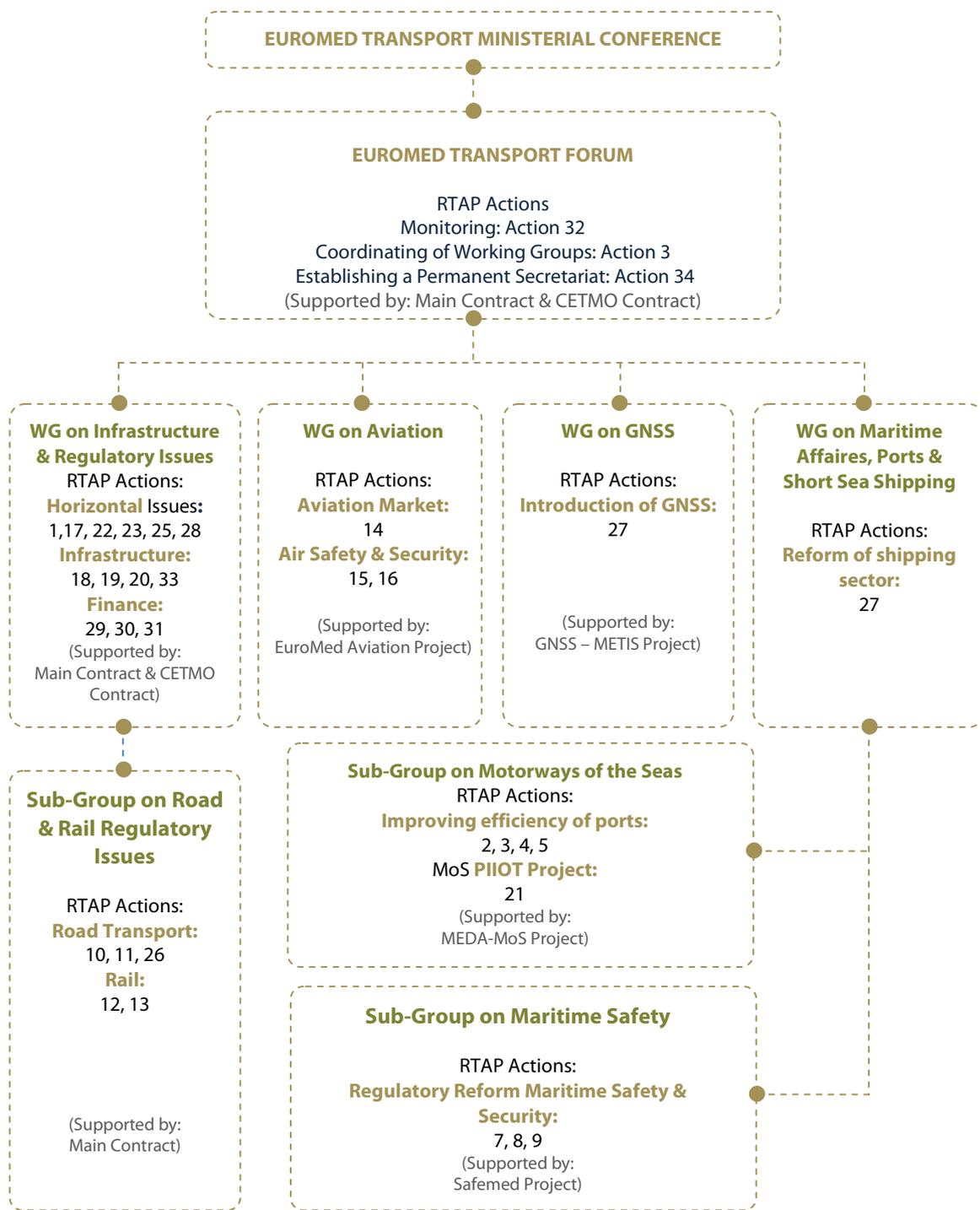


Figure 1: Overview of the EuroMed Transport Project Forum and its Working Groups



The purpose of this study is to provide the actual status on the topics addressed by the RTAP actions 10 and 11 and to provide recommendations on how the actions can be implemented in future.

1.1 Road Transport – Expectations Regarding Action 10A

The aim of Action 10A is to assess each partner country's adherence to a number of key UNECE agreements and to identify measures for implementing the agreements.

Keeping in mind the regional approach of the EuroMed Transport Forum and its projects, adherence to key UNECE agreements by the Mediterranean partner countries could enhance further regional integration of the road transport sector. This would follow the creation of a more balanced level playing field for the road transport sector. Adherence to key UNECE agreements is a first step towards the gradual liberalisation of the market in the region.

By implementing key UNECE agreements, the partner countries would be able to harmonise technical and institutional parameters, thus cutting costs for international road transport. Using standardised documents and legal frameworks will reduce border waiting times and will allow road haulage firms to operate internationally and will reduce costs for the economy at large. It is expected that, once trucking companies in different countries operate on an equal footing, competition between firms from various countries will set in and transport costs will decrease and the level of service will increase. However, for this to happen, various legal, institutional and technical aspects have to be harmonised. Adherence to UNECE agreements will allow such harmonisation.

The following section describes important features of some key UNECE transport related agreements.

The purpose of the UNECE is to contribute to pan-European integration through regulatory alignment in key policy areas. Transport is one of nine core areas of the UNECE. The other core areas are energy, environment, trade, economy, statistics and land management.

The work of the transport division of the UNECE (UNECE TEM = Trans-European Motorways) is carried out through the passing of international conventions and agreements to which member and contributing countries accede and, subsequently, implement.

For the countries of the Eastern Mediterranean the reference body is the United Nations Economic and Social Commission for Western Asia (ESCWA). The transport division of the ESCWA operates in a similar way to that of the UNECE, however insofar as conventions and agreements on road safety are concerned, those of the UNECE are taken as reference. The EU approach to road safety is based on the principles of the UNECE and ESCWA and can, therefore, be used by the partner countries as benchmark when elaborating national legislation on specific areas such as driving license and driver tests, operation license and road worthiness tests.

The Transport related UNECE Agreements deal with

1. Infrastructure networks;
2. Road traffic and safety;
3. Vehicle standards;
4. Miscellaneous legal instruments;
5. Inland navigation;
6. Border crossing facilitation; and
7. Dangerous goods.



Therefore, the following UNECE Agreements are identified as Key Agreements

1. E Road network (AGR) of 1975
2. Combined Transport Network (AGTC) of 1991
3. Convention on Road Traffic of 1968
4. Convention on Signs and Signals
5. Weights and Dimensions of 1950
6. Issue and Validity of Driving Permits of 1975
7. Technical Inspection of Vehicles of 1958 and updated in 1997
8. Global Vehicles Regulation of 1998
9. AETR Agreement of 1970
10. ADR Agreement of 1957
11. TIR Agreement of 1975
12. CMR Agreement from 1956

1. E-Road Network (AGR)

The AGR Convention of 1975 is an agreement on "main international traffic arteries" and has as goal the instalment and appropriate signalling of an international road network. Following this agreement, international roads are expected to be conform to specific quality criteria, including traffic safety, environmental protection, fluidity of traffic flow and comfort for road users. International roads are to be classified as motorways, express roads or ordinary roads.

Turkey is the only EuroMed partner country which has ratified this convention. An accession to this agreement would ensure that partner countries plan their road network according to international standards regarding safety and security.

2. Combined Transport Network (AGTC)

The AGTC agreement of 1991 covers combined transport lines and related installations. Its purpose is to establish a network that can be used for intermodal transport, i.e. for transport using more than one mode. It, therefore, includes railway lines, combined transport terminals, border crossing points, gauge interchange stations, ferry links and ports.

With the exception of Turkey, none of the Mediterranean partner countries has acceded to this agreement.

3. Convention on Road Traffic

The Convention on Road Traffic of 1968 has as overall aim the facilitation of international road traffic and road safety. The convention prescribes rules for the movement and organisation of traffic, guidelines regarding registration numbers, signs and identification marks to be carried by vehicles, as well as rules for technical conditions and driving permits. Contracting parties to the convention are expected to "take appropriate measures to ensure that the rules of the road in force in their territories conform in substance to the provisions of the convention".

Only Israel, Morocco and Tunisia have acceded to this convention.



4. Convention on Signs and Signals

The Convention on Signs and Signals, also known as the Vienna Convention, aims to implement uniformity of road signs, signals and symbols as well as road markings in order to facilitate international road traffic and increase road safety.

Only Morocco, Syria and Tunisia have acceded to this.

5. Weights and Dimensions

This agreement of 1950 concerns the dimensions and weights of vehicles travelling on international roads.

None of the Mediterranean partner countries has acceded to this agreement.

6. Issue and Validity of Driving Permits

This agreement of 1975 sets out minimum requirements for the issue and validity of driving permits. These minimum criteria include eligibility criteria for the examiner and the examination (practical and theoretical test) as well as minimum standards for physical and mental driver fitness in order to establish eligibility for taking a driving test.

Only Morocco has acceded to this agreement.

7. Technical Inspection of Vehicles

The first agreement on common criteria for the technical inspection of vehicles was signed in 1958 and was updated in 1997. The objective of the agreement is to establish uniform procedures for the technical inspection of vehicles, thus enabling their reciprocal recognition in different countries.

None of the Mediterranean partner countries has ratified this convention.

8. Global Vehicles Regulation

The purpose of this agreement of 1998 is "to establish a global process by which Contracting Parties... can jointly develop global technical regulations regarding the safety, environmental protection, energy efficiency, and anti-theft performance of wheeled vehicles...".

The Agreement has been ratified by Tunisia and Turkey.

9. AETR Agreement

The AETR agreement concerns the work of vehicle crews engaged in international road transport. It was first established in 1970 and amended the last time in 2006 for the purpose of introducing the digital tachograph to monitor working hours.

Turkey is a signatory to the agreement.



10. ADR Agreement

The ADR agreement of 1957 concerns the international carriage of dangerous goods by trucks. Through the Economic and Social Council of the United Nations, the UNECE is also responsible for the world wide harmonisation of all provisions governing the transport of dangerous goods via all modes of transport.

Tunisia and Morocco are signatory to the agreement, whereas Syria and Turkey are in the process of accession.

11. TIR Agreement

The TIR agreement of 1975 is an international customs transit system. TIR is the only universal transit system that allows goods to transit from a country of origin to a country of destination in sealed load compartments with customs control recognition along the supply chain. This minimises administrative and financial burdens. Customs duties and taxes that may become due are covered by an international guarantee.

All partner countries, except Egypt and the Palestine Territories are signatory of TIR.

12. CMR Agreement

The Contract for the International Carriage of Goods by Road (CMR) agreement of 1956 is the standard regulation for goods transport contracts.

The agreement has been signed by Jordan, Lebanon, Morocco, Syria, Tunisia and Turkey.

13. E-CMR Agreement

The E-CMR agreement of 2008 is an additional protocol to the CMR Convention. It sets out the legal framework and standards for using electronic means of recording and storing consignment note data, making information transfer faster and more efficient than with paper-based systems.

None of the Mediterranean partner countries has acceded to this agreement.



ALGERIA



2 ALGERIA

2.1 Presentation of the Transports Sector

Indicators of the transport sector in Algeria are as follows:

- Share in the communication sector : 9.7% of the GDP
- It absorbs 10% of the country's investments.

Infrastructure is diversified and quantitatively important:

- More than 80,000 km roads, 71% of which are tarred, including 25,000 main roads ;
- Un The railway network covers 3,973 km, 75% are normally gauged;
- 10 commercial ports, 4 of which are designed for hydrocarbons;
- 54 airports platforms, 12 of which are international;
- 2 East and West gas pipelines to Europe (GME and TransMed) covering about 3,000 km and a network of oil pipelines to convey fuel and GPL designed for internal consumption, covering a total distance of about 2,400 km.

2.2 Transports Sector's Stakeholders

The main actor of the transports sector is the State represented by the Ministry of Transport and Ministry of Public Works. Several other Ministries also play different roles in the field of transports sector: Interior, Finance, Territory Planning, and Environment.

Road infrastructures are under the responsibility of the Ministry of Public Works. In its attributions, the Ministry plans, programs, standardizes, facilitates and controls the entire national highway and road network, builds, operates and maintains it and manages budget funding assigned to road projects.

In the field of roads, the Ministry is broken down into a central administration as well as in Public Works Departments (DTO) spread throughout the 48 Wilayas, in charge of maintaining and developing national roads.

The Ministry also supervises the National Highways Agency (ANA), assigned to engineer and manage the execution of the East-West highway. It also supervises the Algerian Highways Agency (AGA), created in 2005 to be in charge of the operation and maintenance of highways. Oversight on the development and maintenance of roads at the level of Wilayas is their responsibility, while the operation and maintenance of tracks and urban road at the level of cities is the task of municipalities. Supervision is in both cases performed by DTPs.

As for different road transport services, the Ministry of Transport is in charge of the technical and administrative aspects; as in the case of road infrastructure, the management of the road transport sector is made by a central administration and regional representations in the form of Wilaya Transport Departments.

2.3 Adherence to EEC-UN Agreements (UNECE)

Algeria signed the following conventions¹:

- Road traffic (1949)
- Temporary importation of private road vehicles

¹ Source: UNECE



- TIR (1975)
- Temporary importation of aircrafts and vessels
- Temporary importation of utility vehicles

Algeria also signed the convention on the road transport and transit of passengers and goods between Maghreb countries. This convention defines rules of access, stay and transit of vehicles.

The convention related to the transport of dangerous goods was also signed between Maghreb countries classifying products according to international standards and defines transport conditions and procedures between these countries.

2.4 Fleet of Vehicles

Algeria has witnessed considerable growth of its fleet over the last decade. In fact, in 2007 this fleet contained about 3.7 Million vehicles and increased by 35% during the 1998-2007 period versus 14% during the 1989-1998 period. This fleet is expected to contain 5.5 Million vehicles in 2009.

Private cars constitute the bulk of the fleet with about 61%. Utility cars used for the transport of goods (small trucks, trucks, trailers, agriculture tractors, and articulated trailers) account for the second biggest portion with about 37%, while common transportation buses only represent 1.7% of the fleet.

2.5 Results of the Reforms and Corridor Freight

In terms of transport operators, the means available IN Algeria are made up as follows:

- Collective road transport of people: a global fleet of 12,410 vehicles, 90% of which are held by 11,364 private operators and 10% are run by 17 public operators.
- Individual road transport of people: a global fleet of 57,178 taxis;
- Road transport of goods: a global fleet of 272,000 vehicles held by 185,360 operators, 19.5% belong to the public sector and 80.5% represent the private sector. The fleet operated for own professional needs represents nearly 60%.

It should be noted that road transport faces several constraints in terms of organization and infrastructure, including:

- The existence of operators holding only one vehicle, using traditional working methods, with no middle and long term development perspectives;
- Non qualification associated with total lack of knowledge of legislation of most transport operators and their staff about their field of activity;
- Inappropriateness and inadequacy between equipment used and the type of services provided;
- Lack of reception infrastructures both for travelers and for goods, often deprived of installations and of conveniences necessary to their good performance, which results in difficulties to organize road transport activities and poor assistance of users' responsibility;
- Absence of resources and skills that could enable local communities to properly fulfill their mission in terms of organization of transport activities (transportation plan, traffic plans, management of urban transport networks) and the construction of reception infrastructures;
- Deterioration of the notion of public service under the combined effect of the search for profit making and the State's progressive disengagement in terms of funding and supervision of the activity.

In many cities, this has namely resulted in the dislocation of urban transport networks (offer fragmentation, rupture of loads, etc.)



2.6 Road Safety

Algeria, as much as Tunisia and Morocco faces the same problems in terms of road safety.

The number of accidents in Algeria amounts to 39,010 killing 4,117 and injuring 61,139 people.

The number of casualties per million people is 119, a relatively high rate compared to the European average.

Traffic accidents represent an economic loss of about 0.3% of the GDP.

The country adopted Law n° 09-03 dated July 22, 2009 modifying and complementing Law n° 1-17 dated August 19, 2001 related to road traffic organization, safety and police.

This Law introduced the point system and established the probation driving license. It provides for tightening custody sentences and penalties for offences, mainly for truck drivers.

Sensitization campaigns and an increase of control operations will be conducted to reduce the number of accidents.

The Algerian national fleet is considerably growing passing from 3 Million in 2006 to 5.5 Million vehicles in 2009.



MOROCCO



3 MOROCCO

3.1 Presentation of the Transports' Sector

The transports' sector provide in average 7% of the GDP. It directly employs 6% of the labor force, contributes about 15% of the State budget revenues and uses 40% of the national energy consumption. Depending on the year, it absorbs between 20 and 25% of the State investment's general budget.

On the other hand, transport infrastructures in Morocco are quite developed and include the following:

- A road transportation network with the following characteristics:
 - It covers 90% of people's mobility and 75% of the transport of goods and products excluding phosphates;
 - It hosts the traffic of nearly 50 Million-km a day;
 - It covers 61,000 km, 35,660 of which are tarred, and nearly 800 km of highways including 6,000 structures, 56% of which are bridges and 36% are box culverts.
- A railways network, covering about 2,000 km carrying more than 35 Million tons of goods and 25 Million passengers every year;
- 27 port cities and 30 ports in addition to the Tangier-Med port spread over the 3,500 km long shore on the Atlantic Ocean and the Mediterranean Sea, handling an annual traffic of nearly 60 Million tons of goods and the transport of millions people;
- 15 national and international airports, annually catering for 7 Million passengers and 51 Million cargo tons, knowing that the 3 airports of Casablanca, Marrakech and Agadir cover for about 90 % of the entire traffic.

3.2 Transport Stakeholders

The transports' sector is characterized by the existence of several players, both public and private. It is managed by the Ministry of Equipment and Transport (MET) which is the main body in charge of the administration and legislation design.

The road transport in Morocco is organized and managed by the Ministry through the following departments:

- The Roads and Road Traffic Department (DRCR) is in charge of the maintenance and extension of the road network. This includes planning, definition of specifications and standards, provision and allocation of funds, contracting, monitoring works and paying amounts due to contractors. Its mission is supported by FSR.
- The Road Transport Department (DTR) in charge of the administration of road transport activities. It includes two divisions, the Studies and Regulation Division and the Transportation Division.
- The Department of the Road Transportation Safety (DSRT), in charge of the safety of road transports, the safety of vehicles and driving (driving licenses). It manages the technical control of vehicles and the training of drivers.
- The Department of Studies, Planning and Coordination (DEPC) in charge of the transportation sector's information system, the planning and development of the sector and coordination between transport modes.



3.3 Adherence to EEC-UN Agreements (UNECE)

Morocco signed the following conventions²:

- Road traffic,
- Road signaling,
- World technical car regulations,
- CMR (1956),
- TIR (1959 et 1975),
- Dangerous goods (ADR),
- Perishables (ATP),
- Location and validity of the driving license,
- Temporary importation of private road vehicles,
- Customs convention on containers.

Morocco has also signed the transportation convention on transport, the transit of passengers and goods between Maghreb countries. A convention on the transport of dangerous products has also been signed between Maghreb countries classifying products according to an international nomenclature, and sets transport conditions and procedures between subject countries.

3.4 Fleet of Vehicles

The national road vehicle fleet includes about 2.5 million units, 73% of which are light private cars and 26% are commercial vehicles with nearly 75% older than 10 years.

The regions of the Great Casablanca and Rabat – Zammour Zaer hold more than 52% of the national fleet, including 46% commercial cars and 55% private cars.

All cars or trailed vehicles must undergo a periodical technical check up. A check up certificate is then delivered if subject vehicle is considered to be in good operation condition, that no mechanical defect or abnormal wear can be seen, and that breaks properly operate, that the vehicle is equipped with legal accessories, and that it complies with required conditions ensuring traffic safety.

Regarding passengers' public transport vehicles, periodical check ups will in addition focus on fulfilling specific prescriptions that are required to ensure the safety of transported passengers.

Technical check ups are mandatory for:

- Trailed vehicles with a loaded weight exceeding 1 ton (check up is annual).
- Vehicles designed for public and private collective transportation (check up is semi-annual).
- Vehicles designed for driving lessons (check ups are semi-annual).
- Vehicles leased without drivers (check ups are semi-annual).
- All other vehicles aged more than 5 years (check ups are annual).
- Commercial vehicles with loaded weights exceeding 2 tons (check up is annual).

In Morocco, the check up of road vehicles is carried out by the National Safety control agents (in urban areas), the Royal Gendarmerie (outside urban areas) and the Ministry of Equipment and Transport (professional transport).

² Source : UNECE : Transport – Division – Legal instruments



In case a vehicle is intercepted with mechanical concerns (deficient mechanical conditions), the control agent drafts a statement describing the vehicle's conditions. This statement is then forwarded to relevant departments of the Ministry of Equipment and Transport, who may decide upon further procedures. In some cases, the owner of the vehicle may be required to have his/her car undergo a technical check up at an authorized technical control center.

3.5 Passengers Road Transport

The current organization of the passengers road transport is dominated and monopolized by the informal sector, which cannot ensure a reliable quality of service. This type of transport is in fact offered by:

- 8 autonomous public transportation companies (RATC) managed by local communities, permanently facing deficits.
- An important number of urban transport private companies.
- An important number of big taxis which could take a large market share due to the deficit of public transport (more than 30% in Casablanca).

The number of intercity passengers transport companies is 1,478.

Number of vehicles	Total carriers
1 to 2	1,229 (83.2%)
3 to 5	171 (11.5%)
6 to 9	50 (3.4%)
More than 9	28 (1.9%)
Total	1,478 (100%)

- The total number of passengers travelling between cities on the entire Moroccan territory is estimated at 1 027,797 travelers a day, including all road transport modes.
- Travel offered by public buses represents 35.4% of the total number of travel, or about 364,000 travelers a day.

	Number of passengers a day	Percentage
Private cars	434,819	42.3%
Buses	363,692	35.4%
Mixed Transport	20,800	2%
Large Taxis	155,199	15.1%
Train	53,287	5.2%
TOTAL	1 027,797	100%



3.6 Road Transport of Goods

Since its creation in 1963, the National Transport Office was the single charter monopoly and regulator in the field of the road transport of goods and the management of the State's car fleet. This intermediation role between carriers and freighters was paid through a commission received by the ONT, which represented a cost premium for companies that were able to directly deal with the clients.

The reform of the road transport of goods started in March 2003, and aimed at:

- The liberalization of the sector and the initiation of rules for the market economy.
- Recognition of the concept of professionalism in the sector by introducing qualitative criteria for freighters and shippers operating for third parties.
- The enforcement of operation standards similar to standards used in the European Union.

This reform was implemented through the adoption of the new Law n° 16-99 modifying the 1963 Dahir related to road transport using cars.

Enforcement texts concerned the road transport of goods for third parties or for own business (decree n° 2.03.169 dated March 26, 2003 and decision of the Minister of Equipment and Transport n° 2.03.169 dated March 26, 2003 related to the enforcement of said decree and transport standard contracts (Decision of the Minister of Equipment and Transport n° 1744-03 dated September 23, 2003)

Among the main provisions introduced by Law n° 16-99, we cite the abolishing authorizations and the establishment of technical and qualitative conditions to have access to the road transport of goods.

As a consequence, physical or moral entities wishing to transport goods by road to the profit of third parties by means of vehicles with PTAC of 3.5 tons or more, or work as commissioners of the road transport of goods or as renter of vehicles for the land transportation of goods must register in special professional books and comply with professional access conditions:

Good character (good reputation): The Company's legal representative must show evidence of good character to be eligible for the operation of the road transport of goods.

Financial capacity (financial base): this condition reflects the Company's capacity to offer transport services in compliance with quality and safety standards, to maintain its fleet in good operating conditions, and to properly fulfill kits obligations with regard to its staff, its debtors and customers.

Professional aptitude (technical competence): this condition reflects the supervisory level of the transport business, the company management and the company's control of basic techniques required for the exploitation of transport services. It concerns the person in charge of the permanent and effective management of the transport activity or the leasing of car vehicles.

Registration in the special professional book requires the Moroccan citizenship and compliance with access conditions related to good behavior, the financial capacity and professional aptitude.

Registration time is not limited but the company may be struck off the register if a required condition can no more be verified.

ONT was transformed into a National Transports and Logistics Company (SNTL). In a competitive market, SNTL aims at playing the role of goods transport commissioner at the national and international levels, by focusing on developing and diversifying its activities throughout the entire logistic chain. Its action mainly aims at:

- Removing the road goods transportation license.
- Removing the freight monopoly held by ONT.
- Creating two new jobs: commissioners and leasers of goods transport vehicles.



- Integrating owners of 8-tours-and-less vehicle owners in the structured business.

Additional measures supporting this reform have been carried out through:

- The elaboration of a program-contract between the Ministry and the Transport Federation for the 2003-2006 period aiming at modernizing and restructuring the road transport of goods, and a training convention leading to the opening of three training centers.
- The institution and publication of average reference costs for the road transport of goods to the profit of third parties, according to the different types of operated vehicles.
- The enforcement of this reform increased the registration of vehicles, working for own accounts as well to the profit of third parties.
- Creation of new goods transport companies, new commissioners and car leasers.

The year 2008 witnessed the continuation of SNTL's fleet reinforcement program, the continuation of the policy renovation of its commercial agencies network, and the launch of works related to the construction of the first added value logistics center in Mohammedia on a 28 hectare piece of land, in spite of a difficult situation marked by fierce competition and the subsequent drop of the prices the land transportation of goods.

3.6.1 Transport of Dangerous Goods

Morocco ratified on June 11, 2001 the European agreement on the international land transport of dangerous goods ADR published in Dahir n° 1.96.03 dated June 19, 2003.

Provisions of the ADR are applied on Moroccan vehicles as well as foreign vehicles, respectfully transporting dangerous products travelling to or coming from foreign countries.

To enforce ADR provisions at the national level, a new Law bill was elaborated to update the legislative and regulatory framework in force with international norms and standards, increase the safety of people, of goods and of the environment, and have full control of the chain of the land transport of dangerous goods, by defining clear obligations for every stakeholder and sanctions to apply in the case of offence.

3.6.2 Road Safety

In 2005, 51,559 accidents took place throughout Morocco resulting in 80,881 victims, including 3,617 killed and 77,264 injured³. Accidents in rural areas represent 25% of the total number of accidents but they are the most fatal with more than 52%. The month of August has the highest number of accidents (5,187 with 440 killed), followed by July (4,743 killing 335) and June (4,393 with 286 killed).

Traffic accidents represent an economic loss of 2.5 % of the GDP according to World Bank estimates.

The number of killed for 1 Million people is 114, relatively high compared to France⁴ (75) and the average rate in Scandinavian countries (less than 50) in spite of a smaller motorization rate compared to Europe.

The old car fleet (more than 80% are older than 10 years) and drivers' conduct not respecting the road code account for the considerable number of traffic victims in Morocco.

Different actions have been taken to reform the juridical and legal framework related to road safety, mainly the adoption of the January 17, 2005 Decree related to traffic and rolling police, which established:

³ *The transport in Morocco and the concrete regional integration - Jilali Chafik 2007*

⁴ *Road safety in France : Jean Chapelon – June 2009*



- The obligation to use the safety belt (front and back seats) for vehicles with authorized loaded weight does not exceed 3.5 tons.
- Prohibition to use hand-on cell phones when driving.
- Prohibition to seat children aged less than 10 years on the front seats.
- Obligation to equip public passengers' transportation vehicles offering more than 15 seats and goods transport vehicles with PTCA equal and/or exceeding 8 tons, with safety systems (ABS and decelerators, speed reducer).

Control and sanctions have been reinforced by the increase of the number of traffic control agents appropriately equipped (radars, weighing stations) to reduce main reasons for accidents, which are excessive speed, technical overload, deficient mechanical conditions of vehicles, failure to put on safety belts and non authorized overtaking.

The training of drivers now includes the automation of the driving license's theoretical exam and the acquisition of driving simulators.

Information, sensitization and road education through communication campaigns continues to be key elements to reduce road accidents.



TUNISIA





4 TUNISIA

4.1 Presentation of the Transports Sector

Indicators related to the transport sector in Tunisia are as follows:

- Its share in the Gross Domestic Product (GDP) is 6%.
- Its added value represents 1.67 Billion €, around 31% of the value generated by services.
- It employs 120,000 people hence 3.9% of the labor force.
- It absorbs 15% of the country's investments with more than 50% of its investments made by the private sector.
- The average annual growth rate is 5.5% for the 2002-2008 period.

The transport infrastructure is made up of:

- Seven (7) international airports offering a total capacity of 13.8 Million passengers, to be reinforced by an 8th airport with a capacity of 5 Million passengers towards the end of 2009.
- 7 commercial ports currently handle the transit of 30 Million tons of freight and 1.3 Million ship and cruiser passengers a year.
- 2,400 km of railways.
- About 22,000 km of classified roads and 400 km of highways.

4.2 Transport Sector's Stakeholders

The transport sector is managed by the Ministry of Transport, which mission is to provide the country with a global, economic and safe transport system, to ensure its proper operation and to make of it an essential factor for economic and social development.



Other intervening government departments in the sector are in particular:

- Ministry of Equipment, Housing and Territory Planning (MEHAT), in charge of the administrative and technical management of road infrastructures as well as the implementation of State policies in the field of territory development.
- Ministry of Economic Development and International Cooperation (MDCI) particularly in charge of designing five-year development plans, and hence planning investments in the sector and the search for external funding opportunities.
- Ministry of Finance (MF): mainly in charge of transportation taxes and funding.
- Ministry of Interior and Local Development (MIDL): particularly responsible for road traffic management.

4.3 Adherence to EEC-UN Agreements (UNECE)

Tunisia has signed the following conventions⁵:

- On road traffic,
- On road signaling,
- Vehicles technical regulations,
- CMR (1956) and the CMR Protocol (1978),
- TIR (1975),
- Dangerous goods (ADR),
- Perishables (ATP),
- Harmonizing border control of goods,
- Conventions in the field of containers,
- Temporary importation of road private vehicles.

Tunisia has also signed the convention on the transportation of goods and passengers, and the agreement on transit between Maghreb countries. This convention defines rules of vehicles' access, stay and transit.

A convention on the transport of dangerous products has also been signed between Maghreb countries, classifying products according to international standards, and defining transportation conditions and procedures between countries.

4.4 Committed Reforms

The national vehicle fleet registered in 2007 about 1.3 Million units versus 0.4 Millions in 1988, hence an annual growth of 7% a year.

Car registration increased from an annual average of 38,000 during the 1988-1997 period to 55,000 for the 1998-2007 period.

The Ministry of Transport considers that 75% of registered fleet is actually in traffic. This estimate results of cross-matching registration figures, technical visits, and public accounting (car tax and single compensation tax).

The fleet structure is dominated by private cars (59%), light commercial vehicles (25%), heavy commercial vehicles (trucks, road tractors, agriculture tractors, trailers and articulated trailers) (13%) and collective transportation vehicles (buses, minibuses) 1%.

⁵ Source : UNCE – Transport Division – Legal instruments



The Tunisian road code (Law n° 99-71 dated July 26, 1999) states in Article 61 that any vehicle, trailer or articulated trailer can be used in traffic only if complying with technical rules pertaining to identification, weights, tires, clearance, dimensions, loading conditions, equipment and design, hooking conditions, and the definition of pollution and noise levels.

Decree n° 2000-147 dated January 24, 2000 defines vehicles' technical equipment and design conditions.

Decree n° 2000 provides for the technical visit's periodicity and procedures as well as the conditions of technical control certificate's delivery and indications to be carried out.

The vehicles' regular technical control is carried out for the other cases by technical visits. The periodicity of the technical visit depends on the type of vehicle.

For instance, road tractors must be subject of the technical visit two years after their initial traffic release; their technical control must later be performed every two years. Ten years after initial traffic release, the technical visit must be carried out every six months.

The Road Transports Technical Agency was created in 1998, and is responsible for:

- Technical control of vehicles.
- Vehicles registration, reception and approval.
- Operational tasks related to driving license.
- Management of driving examination and licensing centers as well as the teaching of car's driving.
- The competition to turn out monitors and inspectors of driving license
- Management and delivery of public transport operation networks.
- Creation and maintenance of road public transport stations.

National legislation prescribes the execution of unexpected technical controls on the road in the framework of special campaigns, or operations conducted by police or National Guard officers, as well as by eligible and sworn agents, who may have the right within their prerogatives to order occasional technical visits, if they come across on the road with vehicles reflecting apparent defects that cannot be immediately repaired on site.

4.5 Passengers Road Transport

4.5.1 Urban Road Transport

The urban road transport is primarily carried out by 13 public companies. The total number of urban passengers grows in average by 3% and amounted to 720 Million passengers in 2008.

The Tunis Transport Company (STT) operates more than 200 lines over a 6,550 km long network, with a bus fleet of 1,150 covering the 4 Governorates making up the Tunis District and serving 2 Million people.

The 12 regional passengers transport companies operate in 20 Governorates (the remaining territory) with a 2,170 bus-fleet and 6,785 employees.

80% of the fleet is designed for urban transportation on a network covering 30,000 km.

School transportation constitutes the bulk of the activity of urban transport companies, as it represents 75% of the regional companies' activity and 45% of STT's.

School bus fees represent 8 to 10% only of overall costs, as the State compensates shortfall due to reduced fees. The State Budget's contribution to urban public transport companies amounts to 200 Million Dinars or 120 M€ a year.



School compensations depend more on budget constraints than on the level, volume and evolution of services.

Access of the private sector to urban public transport services started in 1989, when four companies were first created operating 38 lines with 168 buses and 787 employees. They serve 15.2 Million passengers, representing 4.6 % of STT bus passengers.

This experience of opening up urban transport to the private sector, through limited, has resulted in the diversification of services, as private companies offer only seats, and hence could attract one portion of private car users.

However, urban public transport is losing shares to the profit of private cars. This share dropped from 65% in 1977 to less than 35% in 2008, which increases external factors related to energy consumption, pollution, congestion and the waste of time.

Urban transport is a public service activity and its sustainability depends on finding new sources of funding that would further develop this activity.

Participation of indirect beneficiaries and local communities may relieve the State budget and diversify its funding sources.

Cities are also served by a fleet of 23,230 private taxis, 55% of which operate in the Grand Tunis area.

This is an upon request passenger service, with no preset schedules or defined itineraries, offered within an urban perimeter by means offering between 5 and 9 seats (including the driver's), equipped with a taximeter defining the course fee.

This service is offered by 730 cars, 65% of which operate in the Sahel region.

4.5.2 Intercity Road Transport

Road transport covers 95% of intercity travel, against 5% for railways.

65% of intercity travel is carried out by private cars, 10% by buses operated by the National Intercity Transport Company and other regional companies (20% of their activity) and 20% by intercity collective taxis "Louages" carrying passengers upon request, with no set time schedule, linking a fixed itinerary connecting two or more city transport perimeters, by means of cars offering 5 to 9 seats (including the driver's). Their fees are charged by seat and calculated based on travel distance. The fleet of intercity taxis is 8,489 cars.

Rural areas are served by a passengers' transportation service, operating on request with no set time schedule but on a fixed itinerary inside rural areas by means of cars offering 5 to 9 seats (including the driver's). Their fees are charged by seat and calculated based on travel distance. The fleet of intercity taxis is 9,621 cars.

Intercity bus transport which had for long been a State monopoly (SNTRI and regional companies) was opened to a private company in 2004, now operating 5 lines with a fleet of 18 buses.

As for SNTRI, offering long distance transport lines, mainly between the capital and governorates' cities, it operates 46 lines, including one international between Tunis and Tripoli. Its rolling stock includes 164 comfort buses and it employs 587 people.

The liberalization of intercity transport by bus remains very limited as the private operator's activity represents 3% only. The sector represents a very big investment opportunity.

In order to involve scale economies, owners and operators of intercity taxis or "louage" cars and rural taxis should gather in companies using buses and minibuses.

The intercity road transport of passengers to passenger/kilometer amounts to 22 Billion passengers/kilometer in 2008, broken down as follows:



- Collective bus transport (bus): 17%
- Transport using “louage” cars: 18%
- Private transport (private cars): 65%

The distribution of collective road transport companies (urban and intercity excluding “louage” taxis) by number of employees in 2008 was as follows:

Number of vehicles	Number of collective transport companies
1 to 5	0
6 to 9	0
10 to 19	1
20 to 49	1
More than 50	16
TOTAL	19

4.6 Road Transport of Goods

The liberalization of road transport sector of goods started in 1990 after a 30 year long State monopoly.

There are now 578 goods transportation companies serving third parties, and 1,070 private operators also active in this business.

This sector is entirely made up of private operators as the 14 public transport companies have either been privatized or dissolved.

The road transport of goods in tons/kilometers amounted in 2008 to about 28 Billion T/km.

Competition is considerable between operators in a free pricing system. As a result, today’s prices are below the 1990’s then applied by the State monopoly.

However, most companies are very small, and we do not see any merging-absorption or grouping strategies.

The distribution of road haulage companies according to the number of employees (in 2008) operating for the account of third parties, and using vehicles with an authorized loaded weight (PTAC) exceeds 12 tons is as follows:

Number of employees	Number of companies
1 to 5	139
6 to 9	161
10 to 19	128
20 to 49	99
More than 50	51
TOTAL	578



Empty return represents 60% for small trucks and 46% for other types of vehicles.

The transport of goods for one's own needs is free, and is not subject to authorizations or statements. The same applies for the transport of goods to the profit of third parties, by means of vehicles with authorized loaded weight (PTAC) below and/or equals to 12 tons. On the other hand, the transportation of goods for third parties by means of vehicles with loaded weight exceeding 12 tons is subject of a Specifications Book defining conditions related to nationality, professional viability and professional qualifications (see questionnaire in the appendix) and to the minimum required material means (6 tractors and 12 articulated-trailers with a total capacity of 300 tons and not exceeding 2 years).

The legal representative must not have been subject of any suit for crime or offence requiring more than three months of custodial sentence or six months of suspended sentence; legal representatives must also have never been declared bankrupt or illegible. This criterion can be checked in the individual's judicial file (Bulletin n° 3).

50% of the transport of goods is performed by companies for their own accounts, and is hence made by a large number of private and public operators, the most important of which being industrial and commercial entities. These operators use a fleet of about 330,000 vehicles including 8,000 trailers, 22,000 trucks and 300,000 light duty vehicles.

The analysis of the internal organization structure and the current management mode of transport companies operating for third party accounts show that road freighters are broken down into three categories: structured freighters, family shippers and commercial carriers.

- Most structured companies rely on an integrated organization structure (with at least fifty employees), where the separation of tasks is very obvious as follows: managerial staff, accountability, drivers, etc. Other staff may also include repair and maintenance workshop technicians.

However, in spite of considerable efforts to reduce management costs, some companies suffer from a chronic deficit due to the necessity to practice transport fees in relation with the transport market, even with a renowned service quality.

Other companies no more have financial resources to renovate their fleet, nor even to properly maintain their equipment in spite of reducing to the minimum management and operation fees, due to the lack of profit making freight activities.

- The family company is generally made up of an owner using his/her own vehicles, usually very limited in number, and is characterized by the lack of human resources, particularly the absence of skilled staff in terms of economic management and maintenance operation.
- The organization of commercial carriers looks more like family shippers than structured companies. Their vehicles are used both for their own needs as well to the profit of third parties.

All operators resort to credits and leasing facilities to fund the acquisition of their vehicles.

With the limited size of the transport market and its practices current prices, some structured carriers find it difficult to spare provisions to renovate or upgrade their fleets, and are then bound to use their vehicles for longer periods.

The situation is similar for family-owned freight companies, who find it difficult to renovate their modest fleet and even acquire second hand vehicles.

Adherence to freight unions should be supported to reduce empty returns, limit traffic of large tonnage trucks inside cities, optimize goods collection and distribution itineraries, and improve the quality of service.



4.6.1 International Road Haulage

Over the previous years, the sector took profit of investment incentives mainly including:

- Liberalization of the import of vehicles designed for international transport of goods (TIR).
- VAT exemption for the acquisition of TIR vehicles locally manufactures.
- Adoption of new standards in terms of vehicle weight and dimensions in order to enable national operators to hold operation tools complying with international standards.
- Intervention near the competent authorities of the foreign countries to facilitate the access to the Tunisian TIR operators in these countries and their staff by providing them with long term and multiple-entry visas.

Nonetheless, in spite of incentives, Tunisian participation in transport activities to and from Tunisia is limited to 5% due to difficult access to European countries' visas, installation barriers in European countries, and the limited capacity of the rolling stock.

4.6.2 Transport of Dangerous Goods

In 1997, a law related to the road transport of dangerous goods was promulgated and included regulations to prevent risks that are likely to affect human beings and the environment.

Regulations mainly relate to the following aspects:

- Classification of products according to the nature of risks.
- Packing, loading and unloading conditions.
- Specific technical conditions to be observed by all vehicles.
- Signaling and labeling of vehicles and parcels.
- Safety rules and equipment.
- Traffic rules specific to vehicles carrying dangerous goods.
- Training of drivers.

Texts published to enforce subject law determined provisions related to:

- Danger tagging and earmarks to stick on parcels and vehicles.
- Training of drivers: participation conditions and training modules.
- Safety form to display in the driver's cabin.
- List of materials that must be subject of a road map and the assistance and control of safety units.
- Technical rules related to the equipment and construction of vehicles used for the road transport of dangerous goods.
- List and definition of Class 3 dangerous materials to be carried by road and conditions related to their packaging, loading and unloading.

Besides, the road code's enforcement texts defined provisions related to speed, stops, and parking of vehicles carrying dangerous goods.



4.7 Road Safety

Tunisia recorded 10,073 accidents in 2008 representing a 5.7% reduction compared to 2007. Accidents killed 1,530 and injured 14,085 people. 42.9% of all accidents happened in the Grand Tunis area, with 17.7% of killed and 40.5% of all injured victims.

Speed represents an important factor as it accounts for 28.8% of fatalities and 21.7% of injuries.

Pedestrians' participation remains very high as it represents 39.9% while motorcycles are involved in 27.3% of accidents. Light private still contribute the most to road accidents as they are involved in 59.9 % of the cases. The months of June, July and August register the highest number of accidents (26%).

During the same year (2008), the fleet increased by 4.8%, while the number of driving licenses increased by 4.4%.

The number of fatalities per million people is 143, a very high rate compared to France (75), to the Scandinavian countries' average (less than 50) in spite of a relatively smaller motorization rate.

Traffic accidents represent an economic loss worth of 0.7% of the GDP.

In 2009, Law n° 99-71 dated July 26, 1999 promulgating the road code was modified to introduce the installation of fixed and mobile radars in order to increase fines related to speed, which remains the major cause of accidents, and hence be able to reduce its number.



RECOMMENDATIONS



5 RECOMMENDATIONS

The share of the transportation sector in Maghreb countries' GDP remains relatively limited (6 to 7%) compared to European countries (10%) and particularly some countries such as France (14%).

Increasing productivity may improve this sector's performance and consequently reinforce its support to other sectors of Maghreb economy and mainly become a source for better growth and more employment as is the case in Malta (maritime transport), Singapore (port), Turkey (logistics) ...

In addition, the transport sector in Maghreb countries is subject of important investments, which favored the development of its infrastructure and diversification of activities.

The road sector, the railway sector and the number of ports and airports described above reflect the investment efforts made by the three Maghreb countries, reinforced by programs planned in the middle and long terms, and mega-projects now implemented throughout the region.

The Road Sector

The three Maghreb countries (Algeria – Morocco - Tunisia) launched reforms of the road sector, which represents the main transport means in all of them, both for passengers and for goods.

Until early 90's, this sector was dominated by the public sector and its liberalization resulted an important investments on the part of the private sector.

Markets opening, mainly by Tunisia and Morocco, and the signing of association agreements with the European Union resulted in a diversification of their industries and an increase of their exports, which exceeded 50% of the GDP in some countries (Tunisia).

The increase of trade with the Northern shore resulted in the development of transport services with its different components and accelerated their liberalization (offer increase) in order not to jeopardize trade development but rather stimulate it, reduce costs and increase competitiveness of product to be exported.

Nevertheless, the development of transports must also respect requirements pertaining to safety and protection of the environment.

Legislation must follow this evolution and regularly change in order to comply with aspects related to competition between operators, access to the business, technical standards of vehicles, improving the quality of service, development of multimodal transport and logistics.

Adherence to EEC-UN agreements (UNECE) may incite and facilitate this evolution and compliance with the legislation as shown in the introduction.

Some EEC-UN agreements have not yet been signed by any of the three Maghreb countries.

Recommendation n°1

It is recommended to hold a workshop between UNECE's transport division and road transport key officials in the three Maghreb countries especially that the Division provides technical assistance and holds this type of meetings.
The objective is to further promote benefits resulting of adherence to agreements

The three Maghreb countries could rapidly liberalized the road transport of goods. Nonetheless, road transport's operators are generally small companies, which managers are mainly autodidact.



The rate of empty returns is still very high (more than 50%) and adherence into freight cooperatives to reduce empty return is not a common practice. The optimization of goods collection and distribution expeditions and the improvement of the quality of service must be subject of a program initiated by profession and supported by public authorities. The full liberalization of the international road haulage (TIR) has not had any benefits on Maghreb freighters, which contribution to this activity is limited to 5%.

Recommendation n°2

It is recommended to design an upgrading program for companies specializing in the road transportation of goods, in order to reorganize the sector, encourage companies to restructure, join together, split tasks, and engage reforms to improve management and organization.

A European technical assistance is desired in this domain in order to learn from the European experience.

The liberalization of intercity road transport has been largely engaged in all three countries. Nonetheless, it differs between countries in terms of urban transport. In fact, the participation of the private sector in urban public transport remains limited in Tunisia (less than 5%) while important in the two other countries.

Tunisia chose the development of mass urban public transport (tramways which first line was launched in 1985, Rapid Railway Network for which execution tenders have recently been launched).

Algiers inaugurated its first metro line this year.

Morocco engaged a program to serve Moroccan cities by tramway.

Nevertheless, in all three countries we note reduction in the use of public transportation to the profit of private cars, which increases external costs related to use of energy, pollution, congestion and time waste.

Urban transport represents a public service activity, and its sustainability depends on the search for new funding sources that will enable the development of this activity.

Recommendation n°3

Assistance should be provided to the three countries in order to learn from the European experience in terms of funding urban transport mainly by indirect beneficiaries and local communities.

NIF participation (Neighborhood Investment Facilities) to fund public urban transport projects is desired due to their impact on mobility and the improvement of the transport conditions of the most underprivileged social groups.

The three Maghreb countries place road safety on top of their priorities due to the relatively high rate of victim, both killed and injured by road traffic accidents.

The Maghreb Transport Ministerial Council decided in its meeting held on July 21-29, 2009 to finalize a study on Priority Lines according to road safety standards, and a study on unifying the cars technical check ups.

The Council decided to increase the number of meetings held by the Road Safety Maghreb Committee, as the Road Safety Days held in Rabat on February 18-19, 2009.

The objective is to design a program to be submitted for the approval of the Maghreb Road Transports Commission.



Recommendation n°4

European Technical assistance should be provided to the Maghreb Road Safety Commission that would enable among others to implement a mandatory and permanent training mechanism for road drivers mainly targeting public transportation and the transport of goods and hence the launch of a road safety culture.

A Maghreb program for road safety may be launched similar to the 2003 European program aiming at reducing by half the number of fatal casualties in 2010.

The Maghreb integration is also major federating transport projects. The Maghreb Union Highway (Casa – Tripoli) constitutes a major transport development project between Maghreb countries.

Recommendation n°5

We recommend a European contribution to fund missing links of the Maghreb highway.



APPENDIX



6 APPENDIX

APPENDIX I: Morocco

Adherence to EEC-UN Agreement

Question 1. For each of the following agreements, please state whether your country has already adhered or if it plans to do so and when.

	Signing country	Plans to adhere in		
		2009-2010	2011-2013	+2014
Road Traffic Convention	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Road Signaling Convention	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weight and dimensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving license issuance and validity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicles technical check up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
World technical rules concerning vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European agreement of road transport (ATP, ADR)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Adherence to EEC-UN Agreements: Reasons for non adherence

Question 2. What are the reasons for not adhering and/or not enforcing EEC-UN agreements?

	Budget constraints	Technical/Technological	Socioeconomic	Institutional
Weights and dimensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicles technical checkup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
World technical rules concerning vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Pour pouvoir vous apporter les réponses qui s'imposent, prière préciser les intitulés exacts de ces accords

Key National Legislation

Question 3. What is the age limit for drivers of the international road haulage?

L'âge minimum des candidats est de 21 ans pour la conduite des véhicules affectés à un service public de transports en commun, des voitures automobiles de place et des véhicules dont le poids total en charge dépasse 3 500 kg.



Question 4. Do road freighters employing foreign nationals have to provide their drivers with employment certificates?

In principle, yes.

Questions 5 & 6. What are the daily driving time limits for trucks' drivers? Is there any requirement to take daily breaks and rest times for freight drivers?

Answer: Morocco does not have for the time being any national legislation related to the control of driving time and breaks that must be observed by professional freight drivers.

However, the road code project, approved on January 31, 2009 by the Chamber of Representatives, and now being discussed by the Upper House, settles the base for the regulation of driving and break times for professional drivers.

NB: Vehicles assigned for passengers public transport, offering more than 15 seats and goods transportation vehicles which authorized loaded weight exceeds 5 tons must be equipped with a tachograph approved by the technical officials of the Ministry of Equipment and Transport. This device must be controlled by and calibrated every two years by legal and industrial calibration services.

Question 7 – 8 & 9. Is the "Good Character" criterion included in national legislation? How is it defined? How is it implemented?

Is the "financial base" criterion included in the national legislation? How is it defined? How is it enforced?

Is the "technical competence" criteria included in national legislation? How is it defined? How is it enforced?

Road Transport of Goods: Since March 13, 2003, Morocco launched a global reform of the road transport of goods aiming at liberalizing the road transport of goods, and at encouraging Moroccan Transport Company to modernize their management, apply operation standards used at the international level, and align their practices to competition.

A new legal and legislative framework was designed regulating the road transport of goods, reflected in Law n° 16-99 modifying and complementing Dahir n° 1.63.260 dated November 12, 1963 related to vehicles road transport.

To ensure transition success between the old and new systems, Law n° 16-99 provided for a 3 year long transitional period starting in March 2000, when published in the Official Bulletin to enable all stakeholders (administration and professionals) to take all necessary enforcement measures.

Among the main provisions introduced by Law n° 16-99, we cite abolishing authorizations and the establishment of technical and qualitative conditions to have access to the road transport of goods (financial capacity, professional aptitude and good character).

As a consequence, physical or moral entities wishing to transport goods by road to the profit of third parties by means of vehicles with PTAC of 3.5 tons or more, or work as commissioners of the road transport of goods or as renter of vehicles for the road transportation of goods must register in special professional books and comply with professional access conditions.

Good Character (good reputation): The Company's legal representative must show evidence of good character to be eligible for the operation of the road transport of goods. For this, he/she shall attach to his registration request an original copy of his/her anthropometrical file (legal file).

Financial Capacity (financial base): this condition reflects the Company's capacity to offer transport services in compliance with quality and safety standards, to maintain its fleet in good operating conditions,



and to properly fulfill its obligations with regard to its staff, its debtors and customers. To show evidence of its financial capacity, the Company must attach to its request to register in the professional special books a financial capacity statement justifying the company's possession of proper cash flow required for the operation of the expected number of vehicles.

The carrier or renter must hold proper funds worth of at least:

- 1. For two-axle vehicles: 1,335 Euros per vehicle;**
- 2. For 3-axles-or-more vehicles: 5,340 Euros for the first vehicle 2,670 Euros for each additional vehicle.**

Vehicles taken in consideration to determine the amount of the required financial capacity are motor operated vehicles.

As for the commissioner, he/she must hold proper funds worth of at least 44,500 Euros.

The Company must inform the Administration about any change affecting its financial capacity within one month starting from the change.

Professional Aptitude (technical competence): this condition reflects the supervisory level of the transport business, the company management and the Company's control of basic techniques required for the exploitation of transport services. It concerns the person in charge of the permanent and effective management of the transport activity or the leasing of car vehicles.

The types of diplomas and training as well as the nature and duration of professional experience that must be held by the person in charge of the permanent and effective management of the transport activity or the lease of car vehicles are the following:

- Either a general university diploma delivered by a university institution or an equivalent certificate;
- Or a technician or specialized technician's diploma, delivered by a public professional training institution or a duly recognized and equivalent diploma, certifying training offering modules on transport and/or company management;
- Or secondary school baccalaureate complemented by a training of at least 3 months in the field of transport and/or company management in a professional training institution;
- Or show evidence of at least three working years in a managerial position, within a public administration or a public institution which main mission is transport, or within a transport company.

Nevertheless, for companies using only one vehicle, the person in charge of the permanent and effective management of the transport activity or the lease of vehicles must show evidence of a graduating training in the field of road transport of the management of companies lasting at least three months in a professional training institution.

As for the commissioning activity, the types of diplomas or training, as well as the nature and duration of the professional experience that must be held by the person in charge of the permanent and effective management of the transport activity or the lease of vehicles must be as follows:

- A bachelor degree provided by a university institution or an equivalent certificate;
- A general university diploma delivered by a university institution or an equivalent certificate complemented by a training of at least 3 months in the field of transport and/or company management in a professional training institution;
- Or a specialized technician's diploma, delivered by a public professional training institution or a duly recognized and equivalent diploma, certifying training offering modules on transport and/or company management;



- Or show evidence of at least three working years in a managerial position, within a public administration or a public institution which main mission is transport, or within a transport company.

Question 10. Does national legislation prescribe regular technical road checkups? How often are checkups conducted?

All cars or trailed vehicles must undergo a periodical technical check up. A check up certificate is then delivered if subject vehicle is considered to be in good operation condition, that no mechanical defect or abnormal wear can be seen, and that breaks properly operate, that the vehicle is equipped with legal accessories, and that it complies with required conditions ensuring traffic safety.

Regarding passengers' public transport vehicles, periodical checkups will in addition focus on fulfilling specific prescriptions that are required to ensure the convenience and the safety of transported passengers.

For indication, vehicles that must undergo technical checkups are:

- Commercial vehicles with loaded weights exceeding 2 tons (checkups are annual);
- Trailed vehicles with a loaded weight exceeding 1 ton (checkup is annual);
- Vehicles designed for public and private collective transport (check up is semi-annual);
- Vehicles designed for driving lessons (checkups are semi-annual);
- Vehicles leased without drivers (checkups are semi-annual);
- Cars repaired after accidents;
- All other vehicles aged more than 5 years (checkups are annual).

Question 11. Does the national legislation provide for unannounced technical checkups on the road? How often are these check ups conducted?

In Morocco, the checkup of road vehicles is carried out by the National Safety control agents (in urban areas), the Royal Gendarmerie (outside urban areas) and the Ministry of Equipment and Transports (professional transport).

In case a vehicle is intercepted with mechanical concerns (deficient mechanical conditions), the control agent drafts a formal statement describing the vehicle's conditions. This statement is then forwarded to relevant departments of the Ministry of Equipment and Transports, who may decide upon further procedures. In some cases, the owner of the vehicle may be required to have his/her car undergo a technical checkup at an authorized technical control center.

Road Transport of Goods

Question 12 & 14. Is your country considering liberalizing road transport within its territory? Please describe the advantages and drawbacks of road transport liberalization from your country's perspective?

Please find attached a summary note describing the liberalization of the road transport of goods.

Question 13. Does your country expect national road freighters to conduct business in other countries? What are they?

Please further explain the purpose of the question. Does it mean simply the execution of international transport operations between Morocco and other countries, or the settlement of national freighters in other countries?



Data on Road Transport

Passengers Public Transportation⁶:

The total number of intercity transport companies is 1,478:

Number of vehicles	Total freighters
1 to 2	1,229 (83.2%)
3 to 5	171 (11.5%)
6 to 9	50 (3.4%)
More than 9	28 (1.9%)
Total	1,478 (100%)

The total number of passengers travelling between cities on the entire Moroccan territory is estimated at 1 027,797 travelers a day, including all different road transport modes;

Travel offered by public buses represents 35.4% of the total number of travel, or about 364,000 travelers a day.

	Number of passengers a day	Percentage
Private car	434,819	42.3%
Buses	363,692	35.4%
Mixed Transport	20,800	2%
Large Taxis	155,199	15.1%
Train	53,287	5.2%
TOTAL	1 027,797	100%

Transport of goods for third parties⁷:

Delivered Licenses: 24,804

Fleet designed for third parties: 39,620

Transport of goods for own needs⁸:

Fleet designed for own needs: 30,208

⁶ Indicative statistics according to surveys conducted in 2006 in the framework of the national master plan of the road transport of passengers in Morocco.

⁷ Statistics as of 2007. Statistical details are integrated in the attached summary note.

⁸ Statistics as of 2007. Statistical details are integrated in the attached summary note.



Summary Note of the Evaluation Report regarding the Implementation of the Road Haulage Reform

Areamble

Considering the importance of road transport in the freight activities, representing 75% of carriages excluding phosphates, as well as its impact of its cost on the competitiveness of national products designed for export, and due to the fact that the goods transport system in Morocco does not allow for the practice of a dynamic transport activity nor for the emergence of well structure transport companies that can challenge foreign carriers' competition, Morocco launched since March 13, 2003 a global reform aimed at liberalizing the road transport of goods and encouraging Moroccan transport company to modernize its management, implement international operation standards and comply with competitiveness practices.

A new legal and legislative framework was designed regulating the road transport of goods, reflected in Law n° 16-99 modifying and complementing the Dahir n° 1.63.260 dated November 12, 1963 related to vehicles road transport.

To ensure transition success between the old and new systems, Law n° 16-99 provided for a 3 year long transitional period starting in March 12, 2000, when published in the Official Bulletin to enable all stakeholders (administration – ONT and professionals) to set up the necessary measures for its application.

The Ministry of Equipment and Transports, well concerned about changes in the operation of the road transport of goods, regularly conducts evaluations of subject reform impacts, knowing that its effects can be seen only in the middle and long terms. A national workshop was held on June 27, 2006 with the collaboration of the National Road Freight Federation to examine achievements of three first years after the implementation of this reform.

Results of this evaluation workshop have been subject of a report that represents a reference both for the Administration and for profession, to fine tune the system and make any necessary corrections and adjustments.

Below is a summary note of subject report with updated statistics.

Situation of the Sector before Reform

The first regulatory measures taken in Morocco with regard to the road transport of goods were taken in 1937 (consequence of the 1929 World Economic Crisis also affecting carriers). A progressive policy to organize the roads transport system was put in place (offer quota system, regulating pricing system, freight monopoly held by the National Transports Office (ONT), coordination of activities of the different types of car fleets (ONT chartered public, private and small tonnage vehicles), with the objective of coordinating activities of the different operation modes of vehicles, ensuring processing equality between users and companies, and providing assistance and the promotion of transport activities.

The State regulation from the delivery of license agreements to vehicles authorizations, the organization of transports and payment of transport services, aimed at the strict respect of legislative and legal provisions and the tight, permanent and efficient control of private transports subject of driving license requirements or not.

With time, drifts progressively introduced in the enforcement of legislative and regulatory provisions, and the lack of control has resulted in considerable malfunctions (chaotic management of the Licensing System, lack of professionalism in the sector, important over-cost of transport services' selling prices due to commissions perceived by ONT, support of economically marginal companies operating old vehicles, difficulties related to regulation and the adjustment of offer/demand, proliferation of an informal fleet made up of small tonnage vehicles).



Consequences of malfunctions justified the reform of the road transportation of goods.

Reform Objectives

Reform of the road transports of goods aims at implementing a new, competitive and dynamic road transport system, with no debts or monopoly adapted to international competition challenges. The reform's basic principles focus on the following pillars:

- Encourage the private initiative and promote investment in the field of goods road transport, by abolishing license and removing quantitative restrictions concerning offered services, that is removing the offer quota system;
- Redefine relations between loaders and carriers by removing the freighting monopoly privilege formerly held by ONT, liberalizing goods transportation fees and introduction of standard contracts;
- Integrating the informal fleet in the organized sector by adopting procedural and administrative facilitations;
- Professionalizing the sector by introducing qualitative criteria to have access to goods transportation work in favor of third parties, and the creation of new jobs, including vehicle commissioners and car leasers, to support goods transport activities and operate as carriers in a competitive framework.

Implementing Reform

Reform road haulage sector was implemented in a legislative way through the adoption of the new Law n° 16-99 modifying and supplementing the Dahir n° 1-63-260 related to the transport of road vehicles. Related enforcement texts are the following:

- Decree n° 2.03.169 dated March 16, 2003 related to the road transport of goods for third parties or for one own account fixing registration modalities in the special good transportation books, in the special good transport commissioner's register or in books of leasers of transport vehicles of goods with or without drivers, as well as the definition of transport licenses and documents;
- Decree of the Minister of Equipment and Transport n° 2.03.169 dated March 26, 2003 related to the enforcement of above cited decree defining fulfilling conditions of the financial capacity and the professional aptitude criteria, fixing granting procedures of traffic board registers, and standard transport documents forms and usage modalities;
- Decree of the Minister of Equipment and Transport n° 1744-03, dated September 23, 2003 related to transport standard contracts for the road transport of goods to the profit of third parties and the standard contract for the lease of goods transport vehicles with drivers;

The main provisions introduced by Law n° 16-99 are summarized as follows:

- Abolishing license and enforcement of qualitative technical criteria (financial capacity, professional aptitude and good character) to have access to road transport of goods;
- Creation of new jobs related to the road transport of goods, which are goods transport commissioners and leasers of vehicles designed for the road transport of goods;
- Implementation of a simplified procedure for the integration of informal vehicles in the structured sector;
- Removing the monopoly of the Commissioner's activity;
- Liberalization of the road goods transport fees and creation of a reference fees system;
- Design of a standard contract for the transport of goods to third parties and the lease of vehicles for the transport of goods (Article 11 Quarter);



- Obligation to report on every goods transport operation to the account of third parties by a freight statement.

Accompanying Measures

Explanation of Provisions of Law n° 16-99

An explanation leaflet of Law n° 16-99 was distributed in 120,000 copies at the level of delegations and professional organizations in order to ensure their wide distribution among transporters. A communication and sensitization campaign aimed at explaining texts of Law n° 16-99 was organized on the radio (RTM and 2M) during 5 months. Similarly, FNTR held to the profit of professionals, regional seminars explanation about new legislative and legal provisions of the new system.

Transformation of ONT into a Public Liability Company

Dahir n°1.05.59 dated November 23, 2005 promulgating Law n° 25-02 related to the creation of the National Transport and Logistics Company (SNTL) and dissolution of ONT was published on December 1, 2005. ONT transformation into a public liability company shall enable the office to shift its commercial action towards the development and diversification of its activity, improve its performance and profitability and implement a partnership strategy with other companies to promote its development in the field of transport and logistics.

Elaboration of a new Legislative and Legal Framework related to Road Transport of Dangerous Goods

Legislative and legal texts in force in terms of the transport of dangerous goods by road, including the main text reference text of the March 2, 1938 Dahir regulating the handling and land transport of dangerous goods, suffer from anachronism and multiple deficiencies. To remedy to this situation, a law project related to his situation, MET designed along with professionals a bill project related to the road transportation of dangerous goods in order to update the legal and legislative framework in force and have it comply with international norms and standards, mainly ADR provisions. The draft Law n° 30-05 was approved by the Cabinet Council on November 23, 2005 and adopted by the Chamber of Counselors on 2008.

Amendment of Law n° 15-95 forming the Commercial Code

In support of liberalization of the Transport Commission's activity, Law n° 15-95 forming the commercial code was adapted to include in the title concerning commission contracts a chapter related to the profession's legal system. Amendment also concerned the scope of the Commissioner's liabilities.

Fiscal Incentives

In order to increase the competitiveness of Moroccan transport companies, fiscal incentives have been granted to the road transports sector. They mainly include:

- Recovering VAT on gasoline by freighters, decided in the framework of the 2001 Finance Law;
- Extension of VAT recovery on gasoline by road freighters for their own needs decided in the 2002 Finance Law;
- Application of the minimal rate of 2.5% on customs charges when importing trailers reserved for the transport of textile products and clothes designed for export;
- Application of the minimal rate of 2.5% on customs charges when importing dismantled equipments in the form of CKD elements (Finance Law, 2000 2nd semester);



Reorganization of Tax on Axles

The 2004 Finance Law reduced the tax amount for the car category which PTAC exceeds 9 tons (previous charges ranged between 285 Euros for a 9 ton PTAC to 800 Euros for a 40 ton PTAC, new charges range between 245 Euros for a 9 ton PTAC to 670 Euros for a 40 ton PTAC) and the introduction of payment facilities (2 equal payments) for cars and sets of cars which PTAC exceeds 9 tons.

Liquidation of the Special Empty Return Fund

An agreement protocol between ONT and FNTR was signed on December 21, 2004 about the liquidation of assets held by the special empty return fund for a total amount of 6 Million Euros. 80% of this amount or 5 Million Euros, were fully distributed to right holders in 2005. The rest worth of 20% or 1.2 Million Euros, was unblocked to the profit of FNTR to fund upgrading actions in favor of the road transport sector.

Upgrading MET Road Control – Control of Overload

In order to contribute to control modernizing, MET identified 7 sites for the construction of cars weighing stations. The first station located in Tit Mellil in Casablanca started operation in July 2005, followed by the stations of Fes (Doyat) and Rabat (Laarjate) operated in February 2008. Procedures are ongoing for the construction of other stations in Marrakech, Agadir, Oujda and Tangiers.

Publication of Reference Costs

In application of provisions of Law n° 16-99, MET carries out since June 2006 the publication of a note of information containing the average reference costs of the road transport of goods for third parties. The calculation of road freight transport to the profit of third parties at the national level was made according to the different types of operated vehicles. Average costs are elaborated with the objective of informing and orienting different players mainly loaders, commissioners and road goods transport operators, and represent a reference on terms of fees to apply in a competitive, free and transparent framework.

Fleet Renovation

The Government decided in the framework of the 2008 Finance Law the institution of allowances for the renovation of road freight transport vehicles serving third parties for the 2008-2010 period. This program is based on two fundamental principles:

- The final withdrawal from traffic of the vehicle to be renovated and the launch of a demolishing procedure;
- Replacement of the vehicle by a new vehicle (equipped with safety systems) with a minimal load of 15 tons;

The renovation allowance amount was determined based on PTAC and the age of vehicle designed for renovation.

Vehicle age	Allowance amount in dirhams	
	PTAC ≤ to 14T	PTAC > to 14T
Between 15 and 20 years	9,790	11,570
More or equal to 20 years	8,010	9,345

The renovation program was launched by the Minister of Equipment and Transports on July 16, 2008 in Casablanca.



MET- FNTR Program Contract

Once reform was enforced, a wide debate was launched between MET and FNTR based on the Governmental Declaration's strategic orientations dated November 21, 2002, highlighting the necessity to modernize and continue the assisted liberalization of the transport sector and encourage investment.

Debate resulted in the signing on March 25, 2003 between MET and FNTR of a Program-Contract for the 2003-2006 period representing the reference framework of both parties' joint action to support the restructuring and modernizing of the road transport of goods.

Evaluation of Reform Implementation – March 12, 2008

- **69,828** registered cars broken down as follows:
 - **39,620, or 57%**, for third party accounts;
 - **30,208, or 43%**, for own accounts.
- **24,804** certificates delivered for the registration of freighters for third party accounts including **11,040** certificates delivered to companies created after March **12, 2003**, hence a total of **24,804 operators using a fleet of 39,620 vehicles broken down as follows according to their PTAC:**
 - **20,115** vehicles, or **51%: PTAC ≤ 8T.**
 - **12,120** vehicles, of **31%: 8 T < PTAC ≤ 19 T.**
 - **7,345** vehicles, or **19%: PTAC >19T.**
- **30,208** traffic strips designed for own account transport spread according to tonnage as follows:
 - **12,318** vehicles or **41%: PTAC ≤ 8T.**
 - **9,521** vehicles, or **31%: 8 T < PTAC ≤ 19 T.**
 - **8,369** vehicles, or **28%: PTAC >19T.**
- **110** freight commissioners and 18 leasers of freight transport vehicles.

Fleet Structure

The share of freight transport fleet for third party account (**57%**) progressively increases at the expense of cars for own accounts (**45%**), which complies with the reform objectives. However, the portion of vehicles designed for own-account transport is still relatively high which proves that most industrials and business peoples still prefer to carry out their own transport activities with their own vehicles. The emergence of structured transport companies capable of offering transport services responding to users' needs in terms of safety, availability, timing and cost will encourage industrials and business people to outsource transport activities.

Distribution of Fleet according to Age of Vehicles

The average age of freight transport vehicles operating for third-party accounts is relatively higher than for own accounts. **29%** of the transport vehicles for third-party accounts are **less than 5 years** old versus **39%** for own account transport, and **19%** of transport vehicles for third party accounts are **20 years old** or more versus **16%** for own account purposes.



age<5		5≤age<10		10≤age<15		15≤age<20		20 and over	
CA	CP	CA	CP	CA	CP	CA	CP	CA	CP
11,309	11,661	8,386	5,910	7,439	4,447	4,839	3,480	7,647	4,710
29%	39%	21%	20%	19%	15%	12%	12%	19%	16%

Evolution of the international freight transport fleet⁹: the number of international freight companies is quite similar to the number before enforcement of the 16-99 Law, in spite of opening access to this business to all national companies. In fact, almost all registered companies (98%) run transport activities at the national level. However, removing distinction between carriers operating at the national and international levels enabled the development of the towing of international trailers by Moroccan tractors mainly from the Tangiers Port. The traction activity, even if it enables the compression of the transportation costs of imported products, it reduces participation of national operators in international in the end-to-end international transport.

Structure of freight companies for third-party accounts: the sector is still characterized by fragmented offer (85% of companies own 1 or 2 motor vehicles). 7% of companies do not have vehicles; a normal situation resulting of the registration procedure which does not require the preliminary acquisition of vehicles, especially that carrier may use leased vehicles. On the other hand, 88% of the sector's companies represent individual companies and 11% are limited liability companies.

Communication and sensitization actions must be engaged with the profession to promote advantages for individual company to register as moral entity (SARL, SNC or SA). We note that the study conducted by MET for the definition of the average reference costs of the road transport of goods for third party accounts has shown that the average reference cost (T.km) for individual company is 1.27 times the cost borne by SARL companies (limited liabilities) and 2.1 times the cost of Public Liability companies (SA).

New freight companies operating for third party accounts: 75,5% of freight companies created after launching reforms are small sized companies owning one vehicle while 13% own no vehicles. An important number of newly created companies are managed by university degree graduates (36%), which will raise the supervision level of national companies.

The arrival on the market of new companies will boost competition, induce the fair payment of transport services and have carriers better rationalize their operation. Gains that will be yielded by improving quality and reducing costs will have positive impacts on the economy competitiveness.

⁹ Percentages developed in the main report (situation as of March 12, 2007) were used in the analyses



APPENDIX II: TUNISIE

Adherence to EEC-UN Agreement

Question 1. Pour chacun des Accords suivants, veuillez indiquer si votre pays est déjà signataire ou s'il projette d'y adhérer et quand.

	Pays Signataire	Projeté d'adhérer en...		
		2009-2010	2011-2013	2014 +
European Road Network (AGR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E Combined Network AGTC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European Transport for Combined Transport (AGTC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convention on road traffic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convention on road signaling	<input checked="" type="checkbox"/>			
Weights and dimensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issuance and validity of driving license	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical control of vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
World technical regulations related to vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European agreement on road transport (AETR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



EEC-UN Agreements – Reasons for non adherence

Question 2. What are the reasons for non adhering and/or not enforcing EEC-UN agreements?

	Budget constraints	Technical - Technological	Socio-economic	Institutional
European Road Network (AGR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E Combined Network AGTC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European Network for Combined Transport (AGTC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convention on Road Traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convention on Road Signage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weights and dimensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issuance and validity of driving licenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cars technical control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
World technical regulations related to vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European agreement on road transport (AETR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please further explain your answer

Adherence opportunity is in progress



National Key Legislation: Please answer the following questions

Question 3. What is the age limit for drivers in charge of the international road haulage?

No age limit

Question 4. Do road freighters employing foreign nationals have to provide their drivers with employment certificates?

This question needs to be replied to by another department

Question 5. What are the daily driving time limits for truck drivers?

9 hours.

Question 6. Is there any requirement to take daily breaks and rest times for freight drivers?

Yes, a break of 45 min after driving for 4:30 minutes.

Question 7. Is the "Good Character" criteria included in national legislation? How is it defined? How is it enforced?

Yes. It is defined as follows: the legal representative shall not have been subject of condemnation for an offence require three months of custody or more than six months of suspended custody, and they shall not have been declared bankrupt and not rehabilitated. This criteria is verified through the individual's legal file (Bulletin n° 3).

Question 8. Is the "financial base" criteria included in national legislation? How is it defined? How is it enforced?

Yes, requirement for a minimal fleet of 18 vehicles not older than 2 years (6 tractors and 12 trailers with a total capacity of 300 Tons of useful load)

Question 9. Is the "technical competence" criteria included in national legislation? How is it defined? How is it enforced?

Yes, the legal representative must fill one of the following professional conditions:

- Having acquired in Tunisia a 3-year minimum experience at a managerial level in the field of the transportation of goods. For Tunisian citizens and for countries recognizing Tunisian experience, the professional experience may be acquired abroad based on reciprocity.
- Hold a university diploma in a specialty related to required activity.
- Or hold a professional aptitude test for the transport of goods.

Question 10. Does national legislation prescribe regular technical road checkups? How often are checkups conducted?

The regular technical checkup of vehicles is carried out in technical centers. The periodicity of checkups is determined according to the type of vehicle. For instance, road tractors must be subject of technical checkups two years after their first operation followed by annual checkups. Ten years after initial operation, checkups must be done every 6 months.



Question 11. Does the national legislation provide for unannounced technical checkups on the road? How often are these check ups conducted?

Yes, in the framework of special campaigns conducted by police of National Guard officers as well as by specially liable and sworn officers within the limit of their liabilities, who may order occasional technical checkups if they come across a vehicle showing obvious defects.

Question 12. Is your country considering liberalizing road transport within its territory?

(*) the transport of goods for one's own account is free and is not subject of authorizations or declarations. The same applies for the transport of goods for the profit of other accounts by means of vehicles which authorized loaded weight (PTAC) is less than 12 tons. However, the transport of goods for other accounts using vehicles which PTAC exceeds 12 tons is subject of specifications fixing operation conditions related to citizenship, good character and professional qualifications, as well as to the minimal material resources that are required.

Question 13. Does your country expect national road freighters to conduct business in other countries? What are they?

Yes, with countries of the European Union

Question 14. Please explain advantages and drawbacks of the road freight liberalization from your country's perspective?

Advantages:

- encourage innovation,
- Better quality service
- Price reduction for loaders

Drawbacks:

- Difficult control
- Absence of data to monitor the market

Data on Road Transport

The EuroMed Transport Project has compiled since it started statistical information about Mediterranean countries. Data are now outdated. We would appreciate sending us as much as you can the most recent information you have on the following issues (preferably 2007 or 2008 data):

- Length of highways (roads designed for double lane traffic) about 370 km
- Road transport of goods in Tkm: about 28 Billion Tkm in 2008.
- Road transport of goods in tons-kilometers per type (national, international, trans-border, coastal shipping): Not available
- Road transport of passengers in passenger-kilometer: about 22 Billion travelers-Kilometers in 2008 (excluding urban traffic)
- Road transport of passengers in passenger-kilometer per type of vehicle (private cars, buses, other vehicles) : the modal distribution of the intercity road transport of passengers is as follows:



Public bus transportation	17%
Transport by Louage cars (intercity taxis)	18%
Private transport	65%

- Goods Road transportation companies according to the number of employees (1-5, 6-9, 10-19,20-49, 50+): Distribution of road transport companies according to the number of employees as of 31/12/2008 (**)

Number of employees	Number of companies
Between 1 and 5	139
Between 6 and 9	161
Between 10 and 19	128
Between 20 and 49	99
More than 50	51
Total	578

(**) Ces données concernent le transport de marchandises pour le compte d'autrui au moyen de véhicules dont le poids total autorisé en charge (PTAC) est supérieur à 12 tonnes.

- Road transport companies of passengers according to the number of vehicles (1-5, 6-9, 10-19,20-49, 50+): Distribution of public transportation road transport companies according to the number of employees as of 31/12/2008 (**)

Nombre de véhicules	Nombre des entreprises de transport collectif
Between 1 and 5	0
Between 6 and 9	0
Between 10 and 19	1
Between 20 and 49	1
More than 50	16
Total	19



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Towards an Integrated Euro-Mediterranean Transport System



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